

World Markets	Current	Previous	Pt. Chg	Var(%)
Dow	33130	33002	128	0.4%
Dow Futures	33310	33326	(16)	0.0%
Nasdaq	13236	13059	177	1.4%
FTSE	7412	7470	(58)	-0.8%
Nikkei	30887	30527	360	1.2%
Hang Seng	17259	17196	63	0.4%
Gift Nifty	19501	19483	18	0.1%
Straits Singapore	3169	3147	22	0.7%
South Korea	2423	2406	17	0.7%
Taiwan	16438	16273	165	1.0%
Shanghai	3110	3110	Closed	Closed

Commodity Prices	Current	Previous	Pt. Chg	Var(%)
Copper (\$/MT)	7951	7950	1.0	0.0%
Alumin (\$/MT)	2249	2247	2.0	0.1%
Zinc (\$/MT)	2498	2493	5.0	0.2%
Brent Crude (\$/bbl)	86.0	86.0	0.0	0.0%
Gold (\$/Ounce)	1826	1821	5.0	0.3%
Silver (\$/Ounce)	21.0	21.0	0.0	0.0%
Light Crude (\$/bbl)	85.0	84.0	1.0	1.2%
N G (\$/mmbtu)	3.0	3.0	0.0	0.0%
Sugar (\$/MT)	691.0	689.0	2.0	0.3%
Rubber (Rs./kg)	146.5	147.0	(0.5)	-0.3%
Baltic Dry Index	1778	1780	(2.0)	-0.1%

Currency Exchange Rate	Current	Previous	Var(%)
Rs./ \$ rate	83.24	83.21	0.04%
Rs./ Euro	87.38	87.24	0.16%
Rs./Chinese Yuan	11.41	11.41	0.00%
Yen / \$ rate	148.48	149.12	-0.43%
\$ US/Euro	1.05	1.05	0.00%

Dollar Index	Current	Previous	Var(%)
Dollar Index	106.57	106.80	-0.22%

Support/ Resistance Levels for Today		
	Nifty	Bank Nifty Fut
Support 1	19350	44050
Support 2	19270	43880
Resistance	19500	44390

Securities in Ban For Trade	
IBULHSGFIN	DELTACORP
MANAPPURAM	

### Market Review

**US:** The US stock market indices ended higher on Wednesday as traders trimmed bets on higher interest rates, while Treasury yields eased off of 16-year highs.

**Asia:** Shares rose in Asia after stocks rallied on Wall Street, bringing some relief to financial markets after losses.

**India:** India's benchmark stock indices closed lower for the second straight day on Wednesday as most sectors declined, with banks, realty, media, pharma, and auto leading the declines. **Market is expected to open on a flattish note and likely to witness sideways move during the day.**

**Global Economy:** British services companies suffered a less severe downturn in September than first feared, reflecting a surprise fall in inflation and the Bank of England's decision to leave interest rates on hold. The final reading of S&P Global UK Services PMI fell in September to 49.3 from 49.5 in August, falling further below the 50 threshold for growth.

Sales of homes worth \$10 million or more in Dubai hit about \$1.6 billion in the third quarter, according to an industry report published on Wednesday, up from \$1.13 billion in the same period a year ago. The total value of sales stood at almost \$5 billion between January and September this. Dubai is racing to attract people and capital to drive long-term growth as part of an economic model focused on property investment, tourism and inflows of foreign capital.

**Commodities:** Gold prices edged up on Thursday, getting a reprieve after declining in the previous eight consecutive sessions, as U.S. bond yields and the dollar stepped back from highs ahead of a keenly awaited non-farm payrolls report this week.

Oil prices inched up in early trade on Thursday, clawing back some of the previous session's big losses after an OPEC+ panel maintained oil output cuts to keep supply tight amid concern about a looming slump in global economic growth.

**Currency:** The yen got some much needed relief as the dollar and U.S. Treasury yields both steadied slightly lower on Thursday after mixed U.S. economic data overnight had markets lowering the odds of the Federal Reserve's raising interest rates again this year.

FII Derivative Transactions (Rs. Cr)

Contracts	Purchase		Sell		Net Value	Open Interest (OI)		OI (Previous day)		Change	
	Contract	Value	Contract	Value		Contract	Value	Contract	Value	Contract	Value
Index Future	49413	3906	55748	4465	(559)	187428	15226	165567	13674	21861	1552
Index Option	28448415	2056284	29177911	2096590	(40306)	2989485	266870	3935754	315339	(946269)	(48469)
Stock Future	207336	16194	293499	23379	(7185)	2450459	190958	2360320	186382	90139	4576
Stock Option	250537	20574	252745	20762	(188)	151186	12244	128720	10523	22466	1721
<b>Total</b>	<b>28955701</b>	<b>2096958</b>	<b>29779903</b>	<b>2145196</b>	<b>(48238)</b>	<b>5778558</b>	<b>485298</b>	<b>6590361</b>	<b>525918</b>	<b>(811803)</b>	<b>(40620)</b>

FII All Activity-BBG (Rs Cr)	Buy	Sell	Net
25-Sep-23	9199	10585	(1387)
26-Sep-23	9406	9269	138
27-Sep-23	9975	12164	(2189)
28-Sep-23	24635	27503	(2868)
3-Oct-23	11641	12477	(836)
<b>Month to date-Sept</b>	<b>11641</b>	<b>12477</b>	<b>-836</b>
FII (Prov.) (Rs Cr)	Buy	Sell	Net
27-Sep-23	9575	9930	(354)
28-Sep-23	10711	14076	(3364)
29-Sep-23	10058	11744	(1686)
3-Oct-23	9715	11749	(2034)
4-Oct-23	9849	14273	(4424)
<b>Month to date- Oct</b>	<b>19563</b>	<b>26021</b>	<b>(6458)</b>
DII (Prov.) (Rs. Cr)	Buy	Sell	Net
27-Sep-23	8420	8033	386
28-Sep-23	15118	12407	2711
29-Sep-23	8789	6037	2751
3-Oct-23	9223	7862	1361
4-Oct-23	10050	8281	1769
<b>Month to date-Oct</b>	<b>19273</b>	<b>16143</b>	<b>3131</b>
FII Debt - BBG (Rs. Cr)	Buy	Sell	Net
25-Sep-23	521	458	63
26-Sep-23	1005	556	449
27-Sep-23	945	1180	(235)
28-Sep-23	2161	1301	860
3-Oct-23	1956	558	1398
<b>Month to date-Sept</b>	<b>1956</b>	<b>558</b>	<b>1398</b>

Market Breadth	BSE		NSE	
	No.	%	No.	%
Advance	1250	33%	669	27%
Decline	2446	64%	1746	70%
Unchanged	99	3%	78	3%

Market Turnover	04-Oct	03-Oct	Var (%)
BSE Cash	4957	4652	7%
NSE Cash	77004	70370	9%
NSE Futures	106825	82424	30%
NSE Options	42369781	31344732	35%
Total (Rs.Cr)	42558567	31502178	35%

Volatility Index	04-Oct	03-Oct
Volatility Index	11.66	11.79

Index PE - TTM	04-Oct	Yr. High	Yr. Low
Sensex	23.9	26.0	21.8
Nifty	22.0	24.2	20.0

Corporate News

**IOC to invest over Rs 2,600 crore to set up greenfield units, expand facilities in northeast**

Indian Oil Corporation has firmed up plans to pump in over Rs 2,600 crore in setting up several greenfield units and expanding its facilities across the northeast over the next few years. The board of IOC has already approved various new projects, while some are in the process of getting the nod, with the leading energy firm in talks with the local governments in Meghalaya, Mizoram and Manipur to finalise land parcels for the greenfield units. (MC)

**Bajaj Finance board meet on October 5 to consider up to \$1 billion fund raise**

Bajaj Finance announced that its board meeting on October 5 to discuss raising funds through different methods, including preferential issuance of shares and QIP. The company aims to raise between \$800 million to \$1 billion and could do so through methods such as preferential issuance, QIP, or other similar means. (MC)

**UK's Superdry to sell its South Asian IP to Reliance Retail for \$48.27 million**

UK clothing brand Superdry has signed an IP joint venture agreement with Reliance Brands Holding UK for the sale of Superdry's intellectual property (IP) assets, including the Superdry brand and related trademarks in India, Sri Lanka and Bangladesh. Reliance Brands and Superdry will own 76% and 24% of the joint venture respectively. (BT)

Economy

**Govt hikes LPG subsidy for Ujjwala beneficiaries to ₹300 per cylinder**

Ahead of Assembly elections in crucial States, the Union Cabinet increased the subsidy given on LPG cylinders under the Ujjwala scheme to ₹300 from the current ₹200. Under the Ujjwala scheme, which provides poor women with free cooking gas connections, a 14.2-kg LPG cylinder will now cost ₹603 for beneficiaries as against the current ₹703. (Mint)

International

**EV maker Rivian plans \$1.5 bln convertible bond sale**

Electric-vehicle maker Rivian Automotive plans to sell convertible green bonds worth \$1.5 billion and forecast quarterly revenue to rise in line with estimates. Convertible bonds can be dilutive when converted into shares and are typically seen negatively by investors when issued. Rivian's bond will mature in October 2030 and investors will have the option to convert the bonds into cash or shares in the company. (Reuters)

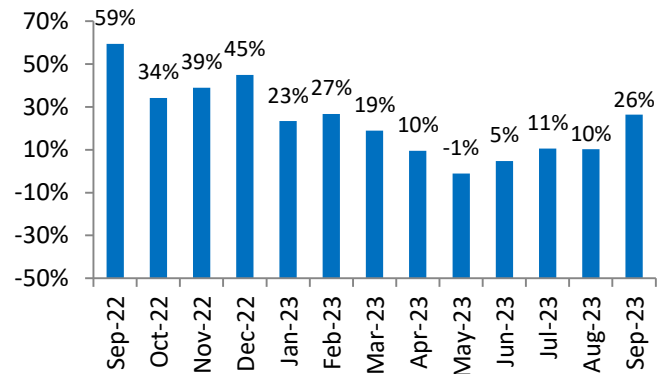
Top 5 Nifty Gainers	04-Oct	03-Oct	Var(%)
ADANIENT	2465	2387	3.3%
NESTLEIND	22986	22315	3.0%
HINDUNILVR	2508	2469	1.6%
EICHERMOT	3401	3351	1.5%
HDFCBANK	1530	1508	1.4%
Top 5 Nifty Losers	04-Oct	03-Oct	Var(%)
AXISBANK	996	1041	-4.4%
SBIN	586	603	-2.8%
NTPC	235	241	-2.5%
INDUSINDBK	1401	1435	-2.4%
ULTRACEMCO	8121	8305	-2.2%

BSE Index Watch	Last	1 day	1 wk	1 mth	1 yr
SENSEX	65226	-0.4%	-1.1%	-0.8%	12.3%
MIDCAP	31877	-1.5%	-0.6%	-0.6%	26.8%
SMLCAP	37429	-1.0%	0.5%	-1.4%	30.3%
AUTO	35788	-1.1%	-3.0%	-1.0%	22.7%
BANKEK	49342	-1.3%	-1.6%	-1.1%	10.6%
Capital Goods	47570	-1.3%	1.9%	3.6%	51.0%
FMCG	18603	0.1%	-0.9%	-0.2%	15.3%
Health Care	28012	-1.5%	0.9%	-0.5%	18.1%
IT	32100	0.3%	-1.5%	-1.7%	14.8%
METAL	22571	-2.0%	-1.0%	-3.3%	22.3%
Oil & Gas	18614	-0.9%	-2.1%	-2.1%	-0.5%
Power	4551	-1.5%	-1.7%	0.0%	-3.2%
Realty	4541	-1.8%	-0.8%	-1.5%	33.2%

NSE USD Futures	04-Oct	03-Oct	Var (%)
Oct Expiry (Rs./\$)	83.26	83.22	0.0%
Nov Expiry (Rs./\$)	83.27	83.24	0.0%
Total Turnover (Rs. Crore)	33993	23399	45%

Sectors	TTM PE
Auto	32.27
Auto Ancillary	42.85
Banking	15.93
Engineering	44.67
Cement	73.11
Diamonds & Jewellery	38.85
Housing Finance	20.5
Infrastructure & Const	29.4
Metals-Aluminium	36.02
Metal - Steel	14.04
Oil Expl.	14.79
Pharma	7.87
Power – Gen. Supp.	41.41
Information Tech.	16.41
Sugar	11.26
Telecom Serv. Prov.	154.7
Tyres	33.67

**Ashok Leyland Monthly Volume Growth (YoY) (Source: Co.)**



10 year G-Sec Yield	Current	Previous	Change
US	4.71%	4.73%	(2) bps
Japan	0.80%	0.81%	(1) bps
India	7.24%	7.23%	1 bps
UK	4.58%	4.60%	(2) bps
Libor 3 Mths	5.68%	5.65%	3 bps

Indian Eco Data	Current	Previous	Var(%)
Forex Reserve (US\$ in bn)	525	528	-0.7%
Inflation – WPI	-0.52%	-1.36%	84 bps
Inflation – CPI	6.83%	7.44%	(61) bps

India GDP	Q4FY23	Q4FY22	Var(%)
Growth	8.00%	6.06%	194 bps

Monetary Policy	Current	Previous	Change
Repo Rate	6.50%	6.50%	0 bps
Reverse Repo Rate	3.35%	3.35%	0 bps
CRR	4.50%	4.50%	0 bps
O/S Banking System Liquidity (Rs bn)	-183	-44	(138.4)

IIP Growth %	Jul-23	Jul-22	YTD
IIP	5.7	2.2	4.2
Mining	10.7	-3.3	7.3
Manufacturing	4.6	3.1	4.8
Electricity	8.0	2.3	2.9

ADR Price Movement

Company	Price (US\$)	Volume	Previous Day Price	Volume	Variance (%)	No. of Share Per ADR	ADR Price (Rs.)	BSE Price	Variance (%)
Infosys Tech	17.44	7318783	17.00	6774998	2.59%	1	1451.68	1444.35	0.5%
Wipro	4.88	1048152	4.82	740056	1.24%	1	406.21	404.90	0.3%
Dr.Reddy's	65.87	178628	66.10	167652	-0.35%	1	5482.94	5417.80	1.2%
ICICI Bank	22.67	3087482	22.55	2667274	0.53%	2	943.51	930.05	1.4%
HDFC Bank	59.26	3022160	57.52	2255548	3.03%	3	1644.24	1529.55	7.5%

GDR's (US\$)

	Prices	Prev. Close	Change	Var %
L&T	36.10	36.50	(0.4)	-1.1%
RIL	55.20	55.50	(0.3)	-0.5%
SBI	70.20	72.20	(2.0)	-2.8%

US Economy Data	Current	Previous
Inflation (%) (YoY)	3.70%	3.20%
Unemployment (%)	3.80%	3.50%

Interest Rate (%)	Current	Previous
Fed Rate	5.50%	5.50%

US GDP	Q2CY23	Q1CY23	Q4CY22
Growth (QoQ Annualized)	2.10%	2.20%	2.60%

China Economy Data	Current	Previous
GDP	6.30%	4.50%
Inflation – CPI (%)	0.10%	-0.30%

Economic Calendar	Date
Indian GDP Data	30 Nov
Indian Inflation Data CPI	12 Oct
Indian Inflation Data WPI	16 Oct
Indian Monetary Policy	6 Oct
India's Industrial Production (IIP)	12 Oct
US Inflation Data	12 Oct
US GDP	26 Oct
US Unemployment Data	06 Oct
US Fed Rate	01 Nov
China GDP	18 Oct
China Inflation Data	13 Oct

Event Update

Name	Date	Purpose
Yug Decor Ltd.	05/10/23	Bonus issue
Accelya Solutions India Ltd.	06/10/23	Equity Rs.30.0000 per share(300%)Final Dividend
Focus Lighting & Fixtures Ltd.	06/10/23	Split/Subdivision
Omfurn India Ltd.	06/10/23	Bonus
Surya Roshni Ltd.	06/10/23	Stock Split from Rs.10/- to Rs.5/-
Sigachi Industries Ltd.	09/10/23	Stock Split from Rs.10/- to Re.1/-

**Bulk Deal As On 04/10/23**

BSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
543499	ACHYUT	SERA INVESTMENTS & FINANCE INDIA LIMITED	S	72000	55.01
541702	ASHNI	TAPAN SURESHSINHJI DESAI	S	500000	19.94
539546	BNL	B B COMMERCIAL LTD	S	46574	71.23
534796	CDG	ANISHA FINCAP CONSULTANTS LLP	B	30000	39.15
534796	CDG	DASAROJU NAGAMANI	S	20000	39.15
543516	DHYAANI	ANTARA INDIA EVERGREEN FUND LTD	S	10000	176
543516	DHYAANI	SAFAL CAPITAL (INDIA) LIMITED	B	10000	176
526473	ELEFLOR	PREETI JAIN	B	790000	6.5
526473	ELEFLOR	ZENAB AIYUB YACOOBALI	S	761810	6.5
524614	INDXTRA	MANISHKUMAR INDRAVADAN MEHTA	S	186529	17.41
541983	INNOVATIVE	BONANZA PORTFOLIO LIMITED	S	39000	23.74
541983	INNOVATIVE	BONANZA PORTFOLIO LIMITED	B	64000	23.73
541983	INNOVATIVE	GITA KIRTI AMBANI	S	227000	23.74
542446	JONJUA	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	B	41520	17.17
538539	JTAPARIA	EPITOME TRADING AND INVESTMENTS	S	104214	50.35
538539	JTAPARIA	VISHAL BIPINCHANDRA DOSHI	B	105106	50.35
504076	JYOTI	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	S	110685	65.96
530163	KERALAYUR	PORINJUV VELIYATH	B	103231	151.87
530163	KERALAYUR	SHON RANDHAWA	S	260000	148.63
540809	MRCAGRO	REENA VISHAL JAIN	B	95000	15.16
538857	SCC	CROCHET TRADE & INVESTMENT PVT LTD	S	72200	4.04
538857	SCC	SUREKHA CHAUDHARY	B	61225	4.04
519397	SHINDL	ZYANA STOCKS AND COMMODITIES	S	294462	43.26
532070	SUMUKA	HAXCO INVEST PRIVATE LIMITED	S	69981	147.82
532070	SUMUKA	HAXCO INVEST PRIVATE LIMITED	B	14537	139.19
532070	SUMUKA	MEENA LACHHMANDAS UTWANI	B	67000	147.82
532070	SUMUKA	YOGIN KOTHARI	S	39230	140.73
539041	SVPHOUSING	ASHISH CHUGH	B	75000	70.27
511447	SYLPH	BAPNA TRUST	S	1246000	3.58
531432	SYTIXSE	KANCHAN DEVI	B	35000	10.75
531432	SYTIXSE	SULEKHARANI	S	51283	10.69
531432	SYTIXSE	SULEKHARANI	B	63	10.17
543991	TECHKGREEN	BP EQUITIES PVT. LTD.	S	40000	110.95
543991	TECHKGREEN	BP EQUITIES PVT. LTD.	B	9600	110.95
543991	TECHKGREEN	KANJIBHAI RABADIYA	B	40000	110.89
543991	TECHKGREEN	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED .	S	52800	110.95
538706	ULTRACAB	CHANDULAL RAGHAVJIBHAI PATEL	S	903015	18.01
542803	VEL	DEEP AGARWAL .	B	43000	17.82
542803	VEL	SANJAY KARANRAJ SAKARIA	B	50000	17.68
531025	VISAGAR	VIVEK AGARWAL	S	4600000	0.71

NSE					
Security Code	Security Name	Client Name	Deal	Quantity	Price
BAIDFIN	Baid Finserv Limited	BHAMINI KAMAL PAREKH	BUY	1000000	32
BHANDA-RE	Bhandari Hosiery Exp Ltd	GEETA RADHAKRISHNA DESAI	SELL	219704	2.51
BHANDA-RE	Bhandari Hosiery Exp Ltd	PRANAV GIRISH BALDAWA	BUY	91690	2.5
BHANDA-RE	Bhandari Hosiery Exp Ltd	VASUDHA GURUDAS DESAI	SELL	118673	2.46
BKMINDST	BKM Industries Limited	GARG BROTHERS PVT LTD	SELL	443180	0.75
DIGIKORE	Digikore Studios Limited	GRETEX SHARE BROKING PRIVATE LIMITED	SELL	178400	283.5
DIGIKORE	Digikore Studios Limited	KHUSHBOO NAHAR	BUY	32000	270
DIGIKORE	Digikore Studios Limited	MANSI SHARE AND STOCK ADVISORS PVT LTD	BUY	56000	274.82

DIGIKORE	Digikore Studios Limited	SAHASTRAA ADVISORS PRIVATE LIMITED	BUY	36800	278.8
DIGIKORE	Digikore Studios Limited	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED .	BUY	40000	283.5
GATECHDVR	GACM Technologies Limited	ACHINTYA SECURITIES PRIVATE LIMITED	SELL	500000	10.19
GATECHDVR	GACM Technologies Limited	NAMARTA JAIN	BUY	600000	10.2
GICL-RE	Globe Int'l Car Ltd-RE	AGRAWAL SALONI	SELL	51000	1
GICL-RE	Globe Int'l Car Ltd-RE	SHRENI CONSTRUCTION PRIVATE LIMITED .	BUY	30000	1
GICL-RE	Globe Int'l Car Ltd-RE	WILSON HOLDINGS PRIVATE LIMITED	SELL	27000	1.02
GOODLUCK	Goodluck India Limited	SAGEONE INVESTMENT MANAGERS LLP	BUY	200000	617.07
HEADSUP	Heads UP Ventures Limited	INDUS COSMECEUTICALS PRIVATE LIMITED	SELL	118859	11.51
IBULHSGFIN	Indiabulls Hsg Fin Ltd	CAPRI GLOBAL HOLDINGS PRIVATE LIMITED	SELL	2500000	171.45
KODYTECH	Kody Technolab Limited	MAHENDRAKUMAR ROOPCHAND KANKARIA	BUY	36000	216.28
KODYTECH	Kody Technolab Limited	YUGA STOCKS AND COMMODITIES PRIVATE LIMITED .	SELL	50400	214.61
LAL	Lorenzini Apparels Ltd	DISCOVERY BUILDCON PRIVATE LIMITED	BUY	99852	224.45
LAL	Lorenzini Apparels Ltd	PARVEEN KUMAR AGARWAL	SELL	55000	224.45
MAL	Mangalam Alloys Limited	SOMANI VENTURES AND INNOVATIONS LIMITED	BUY	396800	80
MASTER	Master Components Limited	BLACKBERRY SAREES PRIVATE LIMITED	BUY	24000	140.3
MASTER	Master Components Limited	RASHMIKANT AMRATLAL THAKKAR	SELL	26000	140.23
MASTER	Master Components Limited	S K GROWTH FUND PVT.LTD.	BUY	25000	140.2
JAIPURKURT	Nandani Creation Limited	TOPGAIN FINANCE PRIVATE LIMITED	SELL	60000	84.5
RPPL	Rajshree Poly Pack Ltd	JAIDEEP SAMPAT	BUY	132377	197.7
SAAKSHI	Saakshi Medtec N Panels L	HEM FINLEASE PVT LTD	BUY	367200	152.12
SAAKSHI	Saakshi Medtec N Panels L	MANSI SHARE AND STOCK ADVISORS PVT LTD	SELL	230400	153.34
SRPL	Shree Ram Proteins Ltd.	MULTIPLIER SHARE & STOCK ADVISORS PRIVATE LIMITED	SELL	1141350	1.35
TRU	TruCap Finance Limited	NAVINCHANDRA RAMJIBHAI CHAUHAN	BUY	727000	59.45
VCL	Vaxtex Cofab Limited	SHIVANG R VACHHETA	SELL	1028265	1.9

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